

# Offboarding Checklist

## Employee Tasks

- ☐ Return company property including keys, IDs, credit cards, permits, and devices
- ☐ Set email and call forwarding
- ☐ Sign agreement confirming removal of company data from personal equipment

## Manager Tasks

- ☐ Review employee documentation and send records to supervisor/HR
- ☐ Notify team of departure
- ☐ Remove employee from recurring meeting schedules
- ☐ Provide letters of reference, certificate of service, and LinkedIn recommendation
- ☐ Plan final lunch and/or “going away” get-together

## HR Tasks

- ☐ Coordinate Exit Interview and review employee feedback
- ☐ Obtain resignation letter
- ☐ Obtain contact information for future correspondence and invite to alumni group
- ☐ Benefits discussion and notify benefit providers of departure
- ☐ Discuss nondisclosure and noncompete agreements
- ☐ Send termination information to employee (e.g. COBRA, unemployment, etc.)
- ☐ Process outstanding expense reports
- ☐ Process PTO balances
- ☐ Process return of signing bonus and/or relocation reimbursement
- ☐ Process final payment
- ☐ [Update e-Signature templates](#) 📄
- ☐ [Reassign Custom Access Level Groups and Approval workflows](#) 📄
- ☐ [Terminate the employee in BambooHR and turn off access](#) 📄
- ☐ Deactivate I-9 and other personnel files
- ☐ Turn off Building / Key Card access
- ☐ Make sure the workspace is cleaned

## IT Tasks

- ☐ Turn off account permissions
- ☐ Collect equipment signed out to the employee
- ☐ Remove records and personal information from company-owned devices
- ☐ Change passwords

*Disclaimer: this checklist is provided as an example only. Please consult with your legal teams and be aware of all applicable laws and regulations when finalizing your onboarding processes.*